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Challenging Year for Stone Fruit Production in Poland

Report Categories:

Stone Fruit

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Report Highlights:

In 2012, Poland's stone fruit output is expected to decrease compared to the previous year, 13 percent in case of cherries and plums, due to unfavorable winter and spring weather conditions. Strong domestic demand coupled with lower production is driving farm-gate prices higher, further challenging the country's competitiveness in its key stone fruit export markets, for both fresh and processed cherry and plum products.

Production:

In 2012, total stone fruit production in Poland will decline as compared to the 2011 crop. Production of cherries is forecast at 185,000 MT, 13 percent lower the previous season. Industry projections are for sweet cherries output to decline more than for sour cherries (21 percent versus 12 percent).

The 2012 plum harvest is expected to diminish to 80,000 MT, 13 percent down compared to the 2011 harvest. Production of other stone fruits, peaches and apricots, is expected to decline by about 50 percent, to 7,000 MT.

The decline in 2012 stone fruit outputs is attributed to: heavy January frost without snow cover, weak fruit set, short flowering period of fruit trees and the lower activity of bees affected by unfavorable weather conditions. In the previous year fruit trees in some regions were cut down due to root system rot what resulted in orchard reduction both in size and number.

The 2012/13 marketing year will be difficult for both processors and exporters as input demand will exceed supply of fruit. Supply shortages are already pushing up farm-gate prices making processors and traders concerned for the price competitiveness of their products both on the domestic and external markets.

Cherries are the main stone fruits cultivated in Poland. In 2011, Polish stone fruit production ratios follow: sour cherry (55 percent), plums (29 percent), sweet cherry (12 percent), peaches (three percent), and apricots (one percent).

In the EU, Poland is the leader in cherry production, with a one-third share of the total EU cherry production. Sweet cherry is a seasonal fruit consumed as fresh and unprocessed. Sour cherry is utilized principally by the processing industry (84 percent). The main sour cherry products are: frozen fruits, juice concentrates and jams or marmalade. Over 50 percent of industrial sour cherry consumption is frozen with almost 80 percent of frozen cherry directed to the foreign markets.

Trade:

Polish exports of fresh cherries and plums vary widely year to year. In 2011 fresh stone fruit exports (including intra EU-27 trade) amounted to 11,000 MT of cherries and 9,000 MT of plums, valued at US\$16.8 and 8.2 million, respectively. Russia was the main importer of Polish fresh cherries, capturing 60 percent share in value, followed by Germany (14 percent).

In 2011 frozen stone fruit exports reached 90,000 MT, valued at US\$180 million. Germany consumed one third of the frozen cherry and plums Poland exported. Russia was the second largest importer at eight percent of share in value and over 20 percent in quantity.

Production, Supply and Demand Data Statistics :

Poland Stone Fruits Production, in MT

	2009	2010	2011	2012 f
Sour cherry	189,200	147,200	175,000	155,000
Sweet cherry	50,500	40,100	38,000	30,000
Cherry total	239,700	187,300	213,000	185,000
Plums	120,700	83,800	91,800	80,000
Peaches	12,500	9,300	8,700	4,000
Apricots	5,200	3,400	4,000	3,000

Source: Polish Office of Statistics, 2012

f – Forecast, Institute of Agricultural Food Economics

Poland Stone Fruit Area, in hectares

	2010	2011	2012 f
Sour cherry	33,000	34,000	35,000
Sweet cherry	12,000	11,600	10,000
Cherry total	45,000	45,600	45,000
Plums	17,900	20,200	20,000
Peaches	3,400	3,500	3,000
Apricots	1,700	1,700	1,400

Source: Polish Office of Statistics, 2012

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Poland Stone Fruit Yields, in MT per hectare

	2010	2011	2012 f
Sour cherry	4.46	5.15	4.42
Sweet cherry	3.34	3.29	3.00
Plums	4.69	4.53	4.00
Peaches	2.73	2.49	1.33
Apricots	2.00	2.35	2.14

Source: Polish Office of Statistics, 2012

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